Self-Funded Checklist

Request for Quote (RFQ)

Please note: Materials should be sent to your sales account executive or client consultant and SalesAdmin@HealthAlliance.org.

Items Needed for Self-Funded Prospects

1. Current year and previous two years of catastrophic claims or large claims reports.
2. Current year and previous two years of Aggregate reports.
3. Current benefit design (or benefits that the group would like to be quoted).
4. Current census in Excel. Include: DOB, gender, ZIP code and plan tier election (EO, ES, EC, EF, E + 1, etc.).

*If the group is currently Fully Insured, Monthly Paid Claim reports with enrollments must be provided.

Information Needed to Quote

1. Type of deductible: Specific and Aggregate or Specific only?
   a. Should the quote include an Aggregating Specific Deductible? If so, what deductible level would you like quoted?
2. What deductibles would they like quoted (max four)?
3. Coverage type: Medical only or Medical with Pharmacy?
4. Contract type(s).
5. Commission level: percentage or per employee per month (PEPM) rate?
6. Are retirees covered under the plan?
7. Current rates and renewal rates (if available).
8. Due date.
9. Networks to be quoted.
10. Rate tier structure (two, three or four tier rates).

Does the group offer any nontraditional benefit plans, options or reimbursement programs to their plan participants?

Please list any other details that will be helpful in the quoting process.

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